APPENDIX B

CASPER Reporting System

(Section 2)

ACCESSING CASPER
REPORTS

Beginning with the Spring July 1, 2002 MDS Release, MDS Provider (MDS Online) Reports are now available to facilities through the CASPER Reporting System. This change in accessibility will allow each user to utilize Netscape or Internet Explorer at their discretion to access all reports. Newer versions of Internet Explorer do not work with Netscape plug-ins, which limits the users' choice in preferred browser.

To accomplish this, all MDS Provider reports in the CASPER Reporting System will be created using the submission date only. Also, the Confidential Memo and the Error Detail Report by Facility have been eliminated.

Facilities will access the reports via the State Page, and will be redirected to the log in screen of the CASPER Reporting System once the MDS Online Reports link is selected.   The User ID and Password are the same that are used to submit MDS files to the State.

To access reports using the CASPER Reporting application:

1.	Access the MDS Welcome home page (Figure 2-1). Select the Online Reports link.
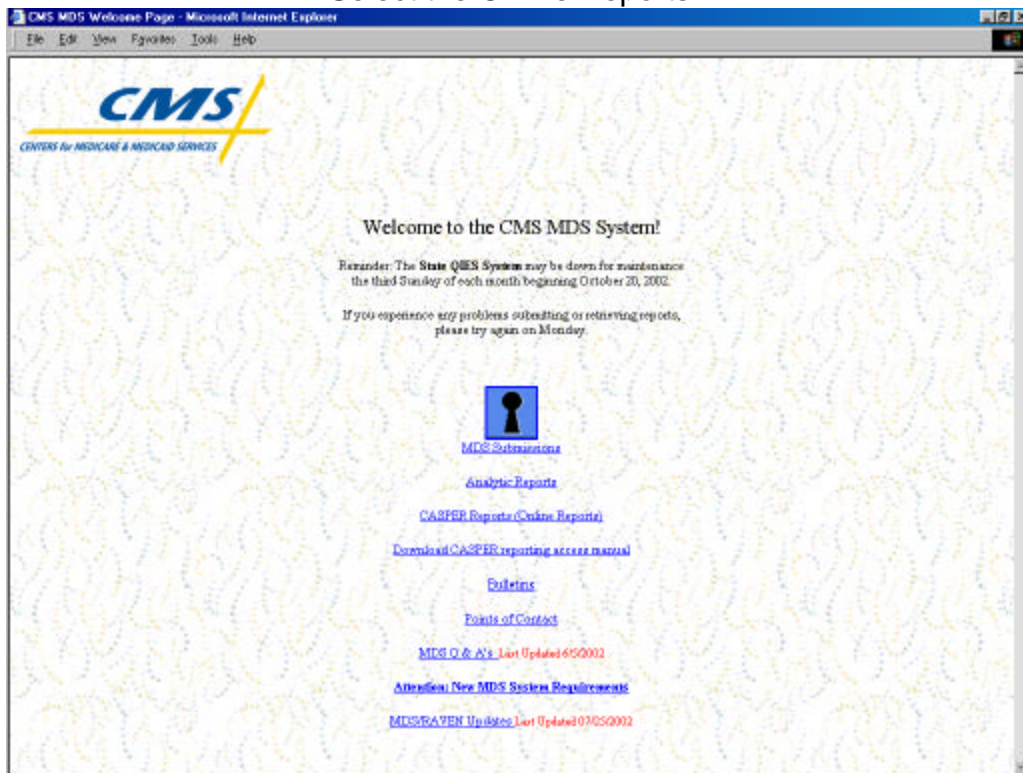

Figure 2-1. MDS Welcome page

The MDS Online Reports page will display (Figure 2-2). Download instructions for obtaining the plug-in are located on this page.
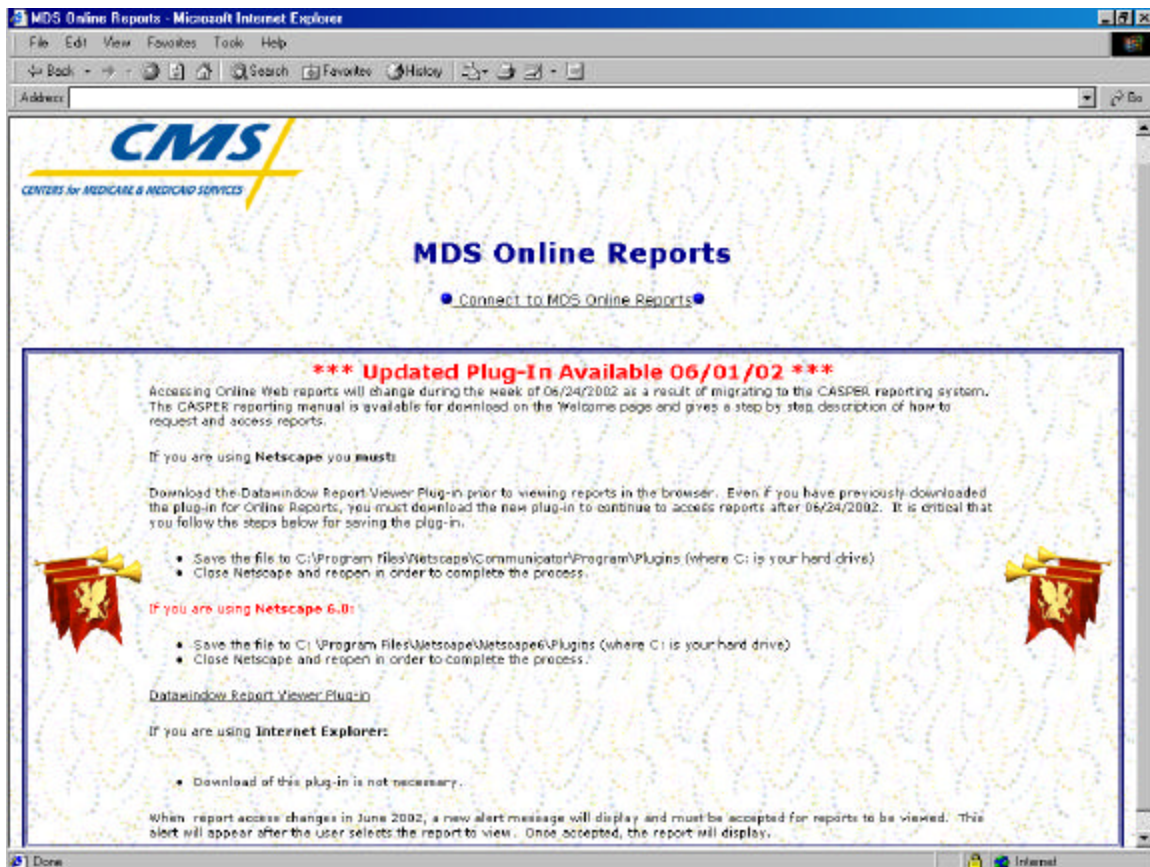

Figure 2-2. MDS Online Reports page

2. If you are a first-time user **and using a Netscape browser**, you must download the required plug-in. If you are using Internet Explorer, or if you have previously downloaded this plug-in for use with the CASPER Reporting application, this step is NOT required and you may skip to step 5 on page 4.

Download instructions for obtaining the plug-in are available on each website. (Figure 2-2.) If you are a first-time user **and using a Netscape browser,** select the Datawindow Report Viewer Plug-in link.

NOTE: This is an updated version of the plug-in used when accessing MDS Online Reports. **This new version is required for Netscape users** in order to view reports using the new CASPER Reporting application. To verify that the correct version is being used, navigate to Window Explorer directory where the plug-in is stored. The file name is "npdwe 70.dll" and the file size is 2.229KB.

4. For those Netscape users that select the plug-in link, a Save As box will display (Figure 2-3).
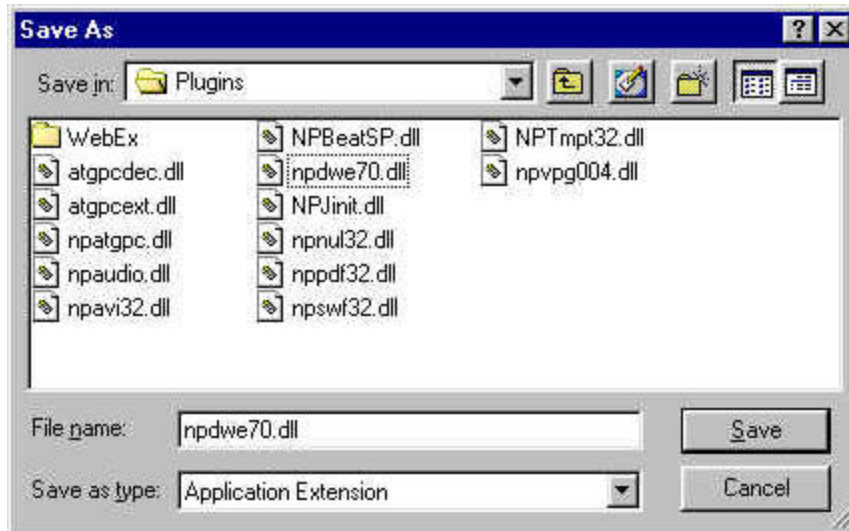

Figure 2-3. Save As Box

If you are using **Netscape**, save the file to C: (where C is your hard drive)

C:\ProgramFiles\Netscape\Communicator\Program\Plugins.

If you are using **Netscape 6.0**, save the file to C: (where C is your hard drive)

C:\ProgramFiles\Netscape\Netscape6\Plugins.

NOTE: After saving the plug-in, you must close all active sessions of Netscape in order to complete the plug-in download and installation process.

If you are using **Internet Explorer**:

This plug-in is no longer needed for use with Internet Explorer. You will be prompted to download an Active X plug-in the first time you view a report in the CASPER Reporting application. That process is completely automated. The only action required of the user is to select the OK or ACCEPT button when prompted to download the Active X plug-in.

If a red 'X' displays when trying to view a report with Internet Explorer, verify that:
   a. 'OK' OR 'Accept' was selected when the security certificate was presented.
   b. The user who is logged in at the workstation has download rights.
   c. MS Java Virtual Machine (JVM) is installed and enabled.

5. Select the <u>Connect to MDS Online Reports</u> link. From the MDS Online Reports page (Figure 2-2).

6. The CASPER Login page will display (Figure 2-4). Enter your login information in the appropriate fields.

Figure 2-4. Casper Login page

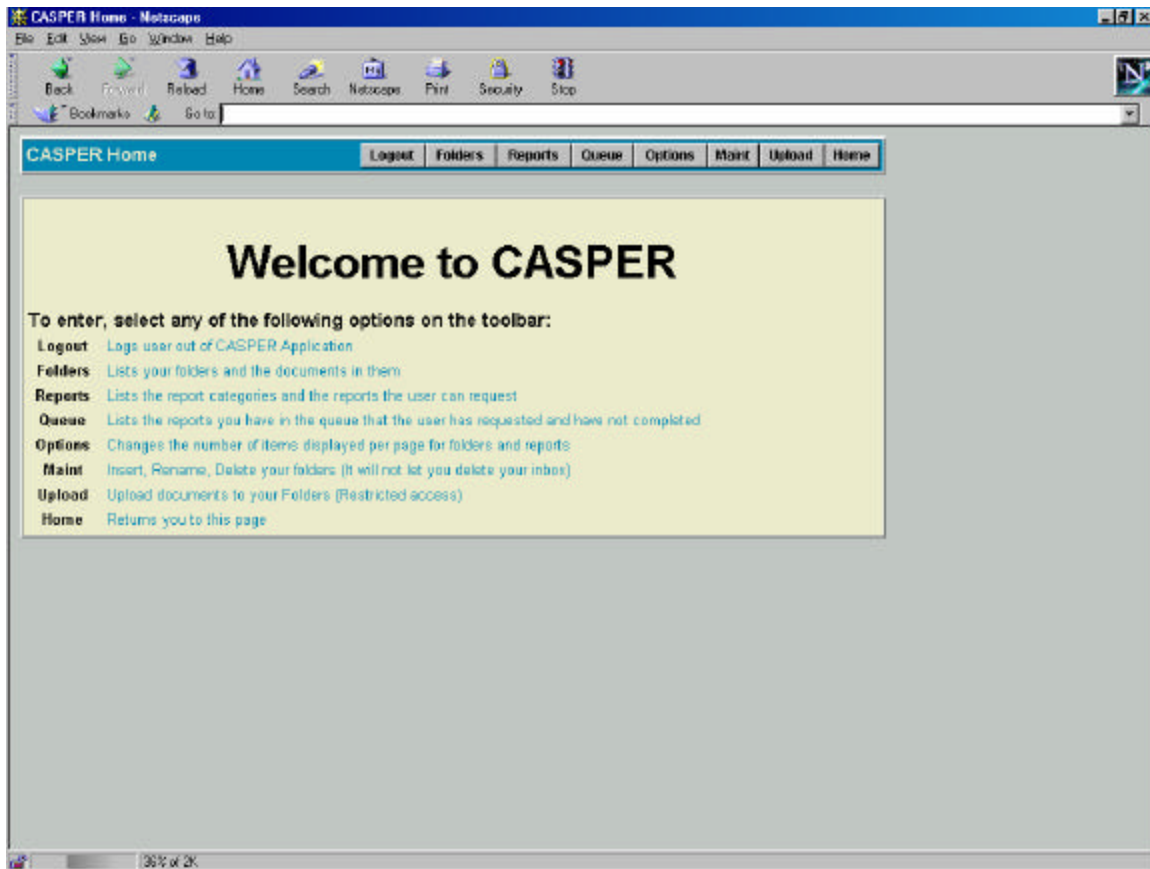7. The CASPER Home page will display (Figure 2-5).

Figure 2-5. CASPER Home page

8. To enter the CASPER Reporting application, select either the Folders button or the Reports button in the CASPER menu bar.

NOTE: If using the Folders button, you will enter the CASPER Reporting application on the page where previously requested reports are stored. If using the Reports button, you will enter the CASPER Reporting application on the page that allows you to select and request reports.

1. To request reports, enter the CASPER Reports page by selecting the Reports button in the CASPER menu bar. The Report Categories section displays the various report groups that are available. The section on the right displays the reports that are contained in the selected report group (Figure 2-6).
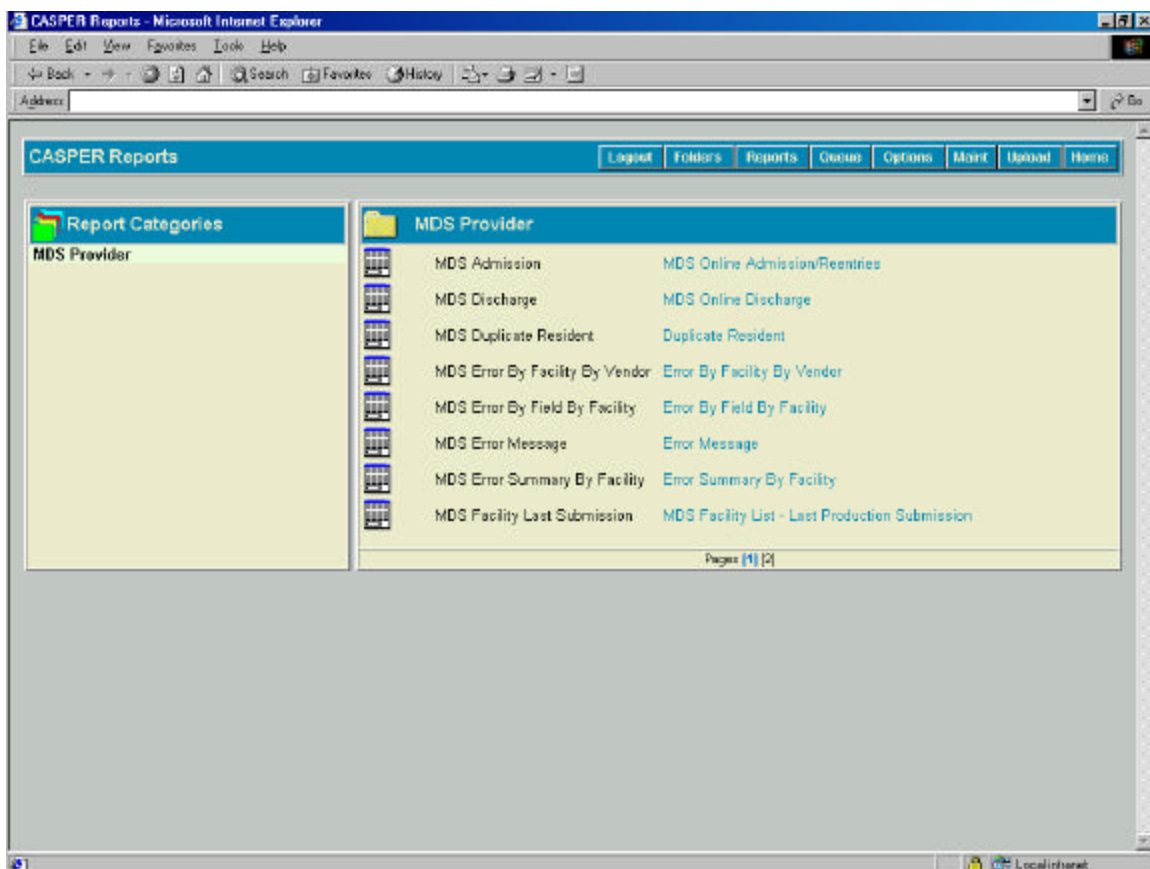

Figure 2-6. CASPER Reports page

2. To request a specific report, click on the abbreviated report name. These are displayed in black text.

3. The CASPER Reports Submit page will display allowing the user to select the desired report criteria. When finished, select the Submit button (Figure 2-7).

NOTE: The criteria choices that are available will vary depending on:

      a. The specific report being requested
      b. The user's level of access.

Figure 2-7. CASPER Reports Submit page

4. Following a report request, the user will receive verification that the request has been received by the system (Figure 2-8).
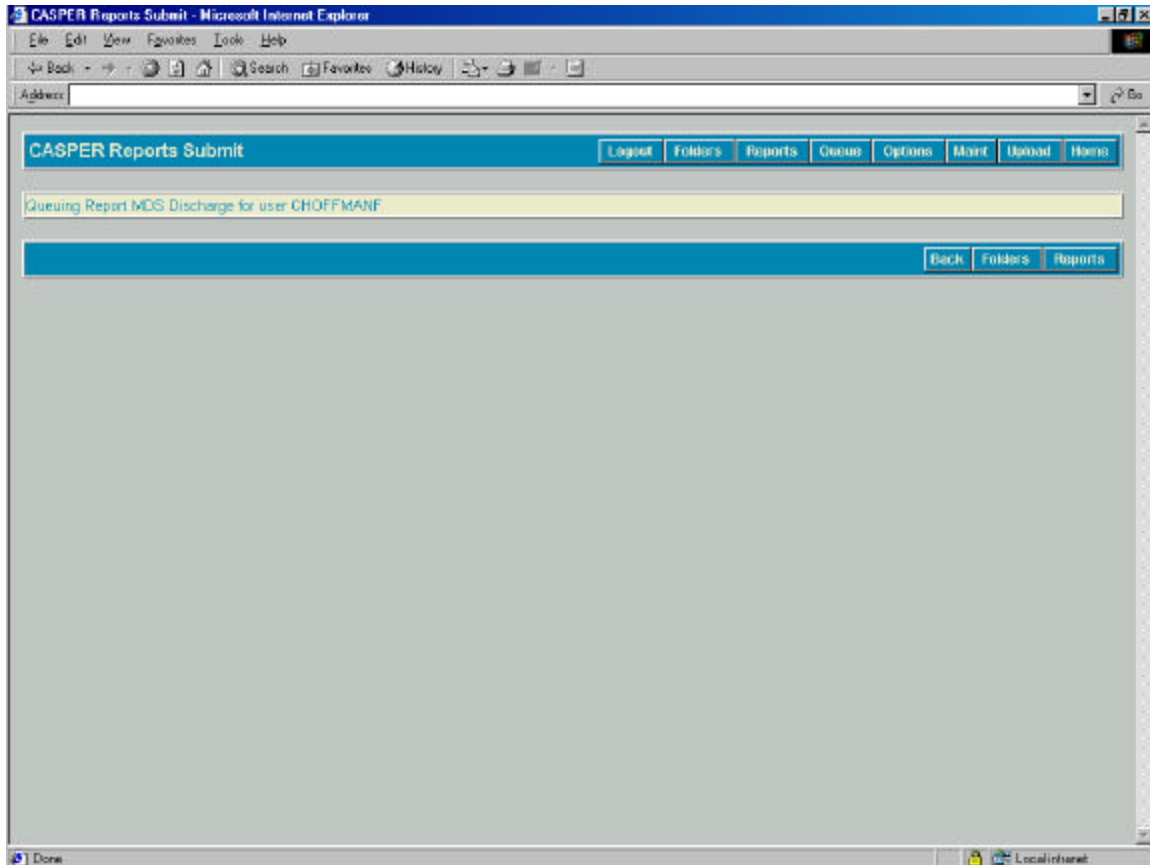

Figure 2-8. CASPER Reports Submit Verification page

6. To request another report, select the Reports button to return to the listing of reports.

7. Completed reports are delivered to the default folder, My Inbox, and are accessed by selecting the Folders button.

8. The status of requested reports can be viewed by selecting the Queue button in the CASPER menu bar. The CASPER Report Queue will display with detailed information including the report's position in the queue, the corresponding Que Id, the name of the requested report, and the processing status (Figure 2-9).
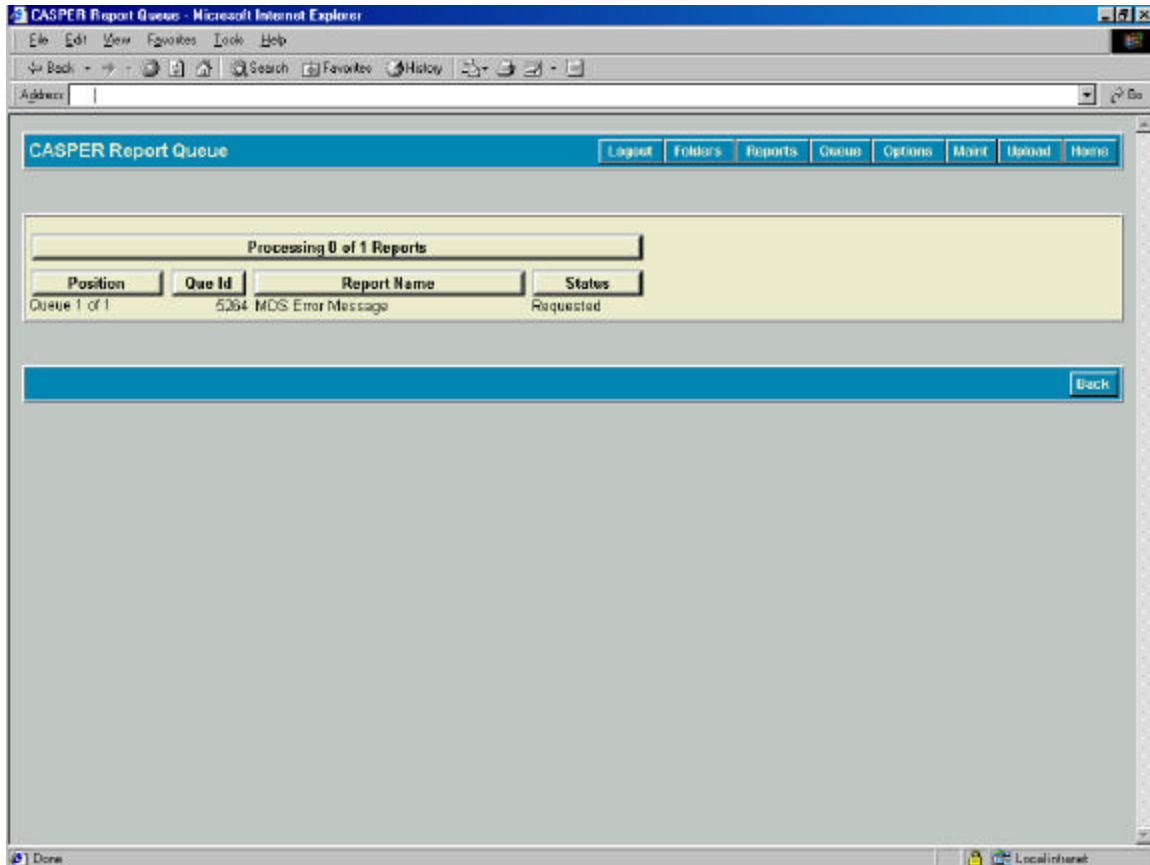

Figure 2-9. CASPER Report Queue

NOTE: The length of time needed to generate a report following a request may vary. Therefore, it is suggested that the user log off after requesting the desired reports, and then return to the reporting system at a later time to retrieve the reports.

1.   Shared folders are ones similar to those already used. However, these folders are created for users and labeled as "Read Only". Users will have access to the folders and the reports that they contain, but will not be able to alter, modify, delete, move, or rename these items. (Figure 2-10).
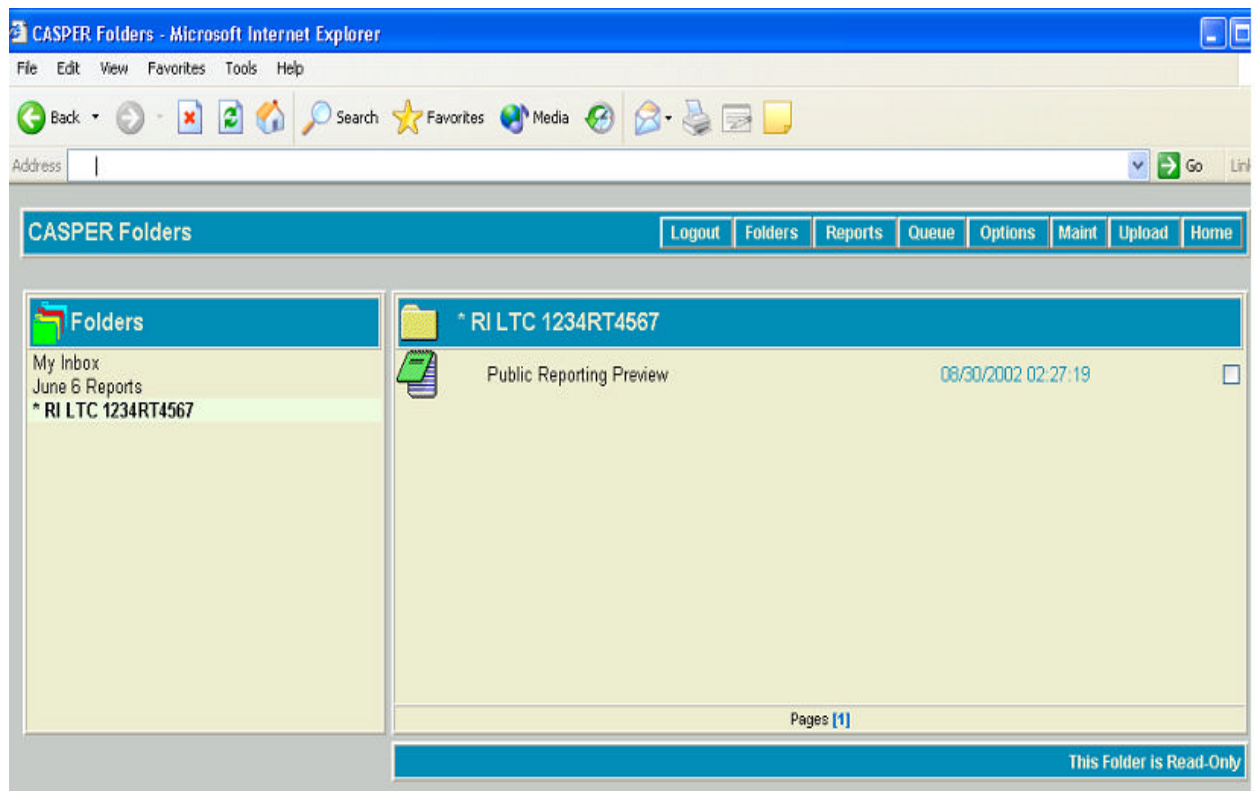

Figure 2-10. Shared Folder

NOTE: The naming convention used for shared folders is as follows:
Asterisk (space) state abbreviation (space) facility type (space) fac ID

1.   In order to view reports, select the Folders button.
     The CASPER Folders page will display. When
     completed, previously requested reports are delivered
     to the default folder titled My Inbox (Figure 2-11).
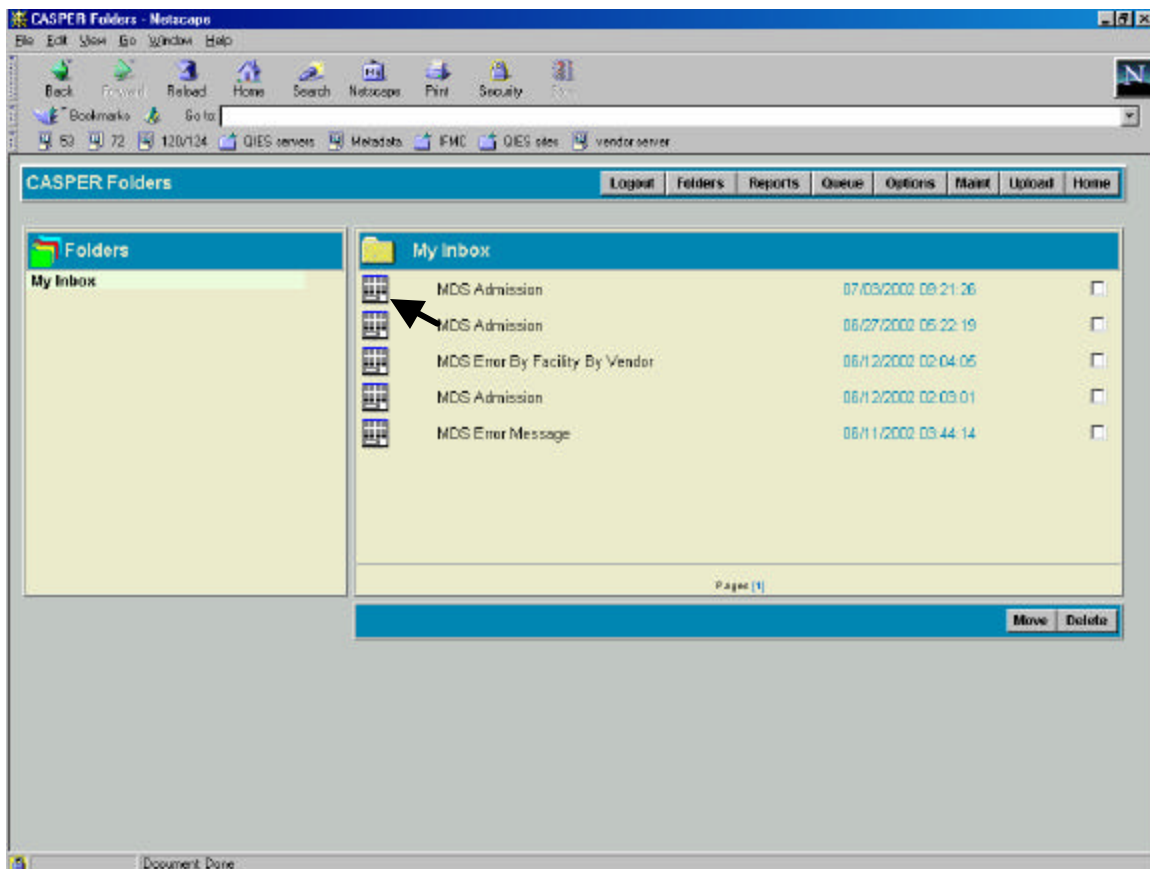

Figure 2-11. CASPER Folders page

2.   In order to view a report, click on the name of the
     desired report.

3.   A summary of the report criteria can be viewed by
     moving the mouse pointer over the report icon. A
     pop-up message will display with a brief description of
     the report criteria.

4. More detailed information regarding the report criteria can also be displayed by clicking on the report icon (Figure 2-12).

Figure 2-12.

5. Use the report criteria information as a guide when selecting from a list of multiple reports. When selected, the following page will display (Figure 2-13).
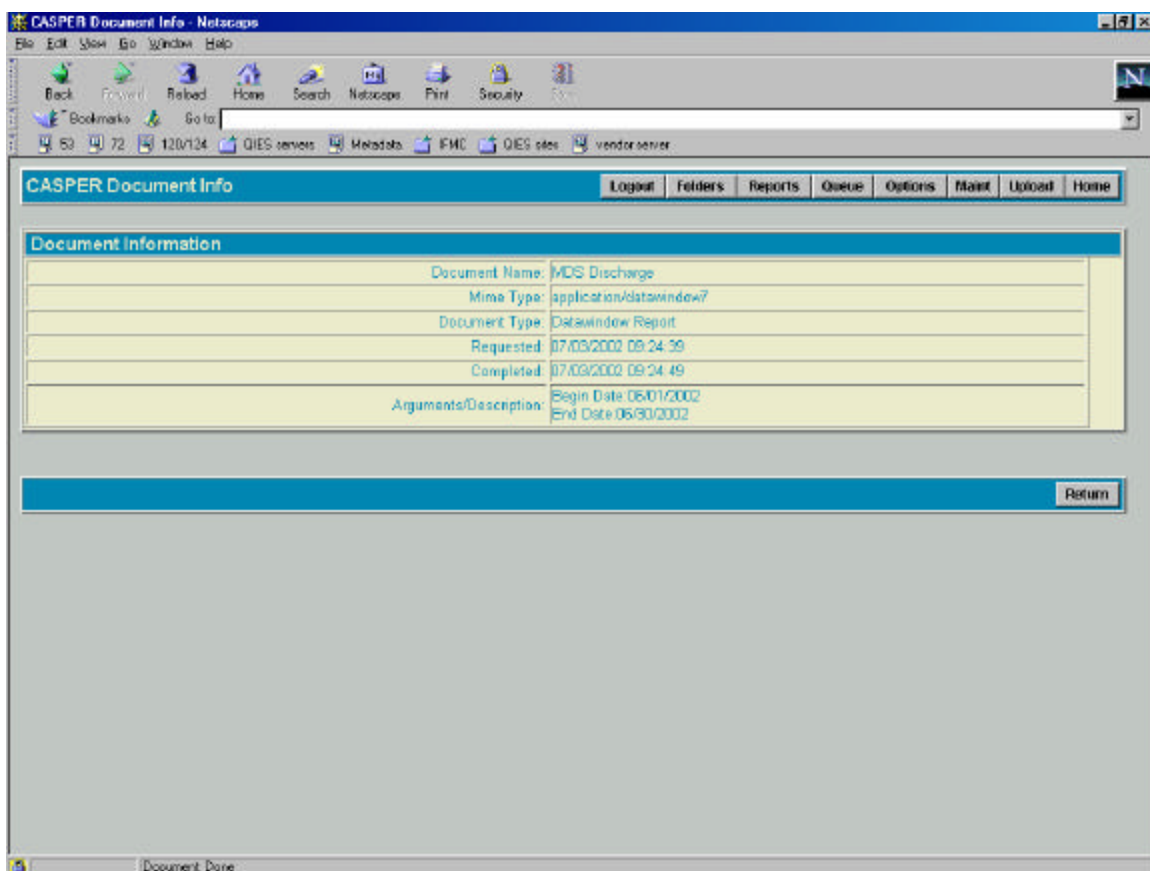

Figure 2-13. CASPER Document Info page

Internet Explorer Users:

1.   Use the Reports tool bar located directly under the
        report window. This feature is available with Internet
        Explorer due to the Active X plug-in capability.
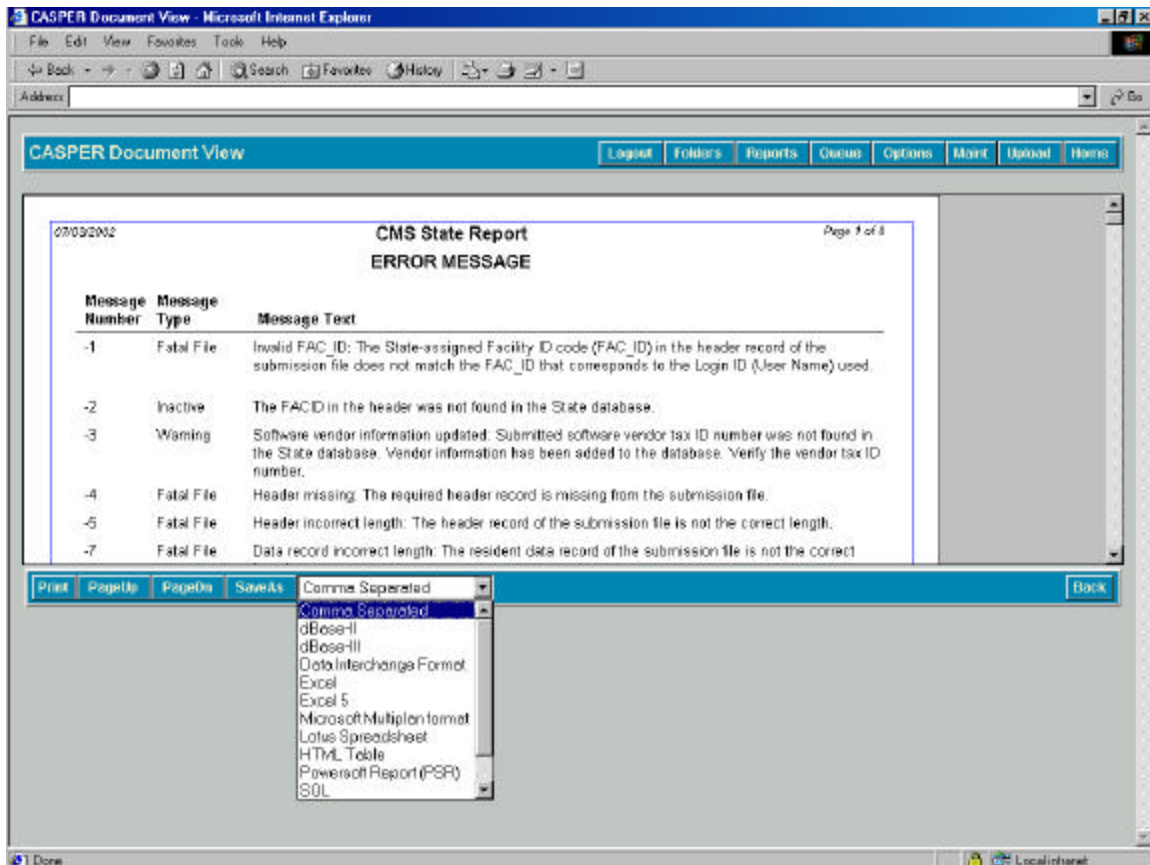   (Figure 2-14).

Figure 2-14. Printing, Saving and Exporting Using Internet Explorer

2.   To **print** the report, select the Print button from the
        reports toolbar. The report will automatically be
        printed to your default printer.

3.   To **save** the report, select the desired format from the
        drop down box. Select the Save As button. **NOTE:
        Internet Explorer 5.5 SP2 and 6.0 do not support
        saving reports in their original format, Powersoft
        Report (.psr). The IE PSR Viewer described on
        page 23 is available for this process.**

4. To **export** to a spreadsheet, select Excel (.xls) from the drop down box. Select the Save As button. The browser will display the report in a spreadsheet. To save this information, select the Save As option from the File drop down menu in your browser.

Netscape Users:

1. Users are given the option to Print or Save Rows. In either case, while viewing a report you must right click anywhere on the report to display these options. The built-in browser tools will not print or save the reports (Figure 2-15).
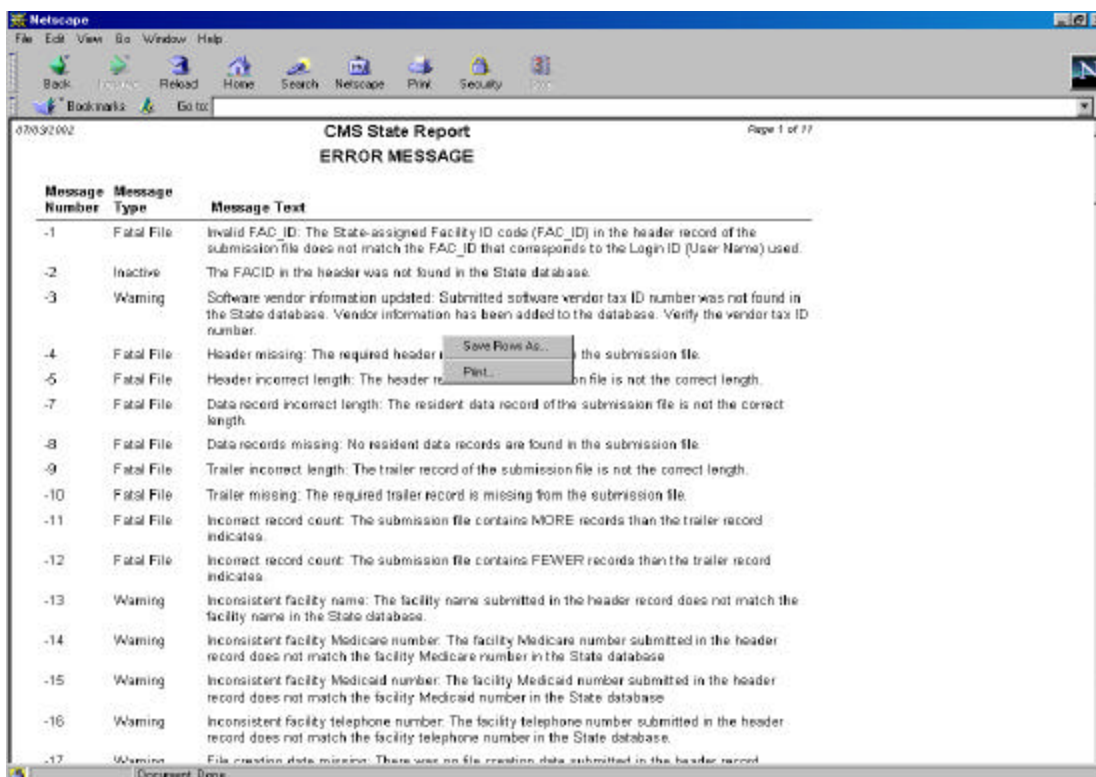

Figure 2-15. Printing, Saving and Exporting Using Netscape

2. To **print**, select the Print option. Your Printer dialog box will display allowing you to finish the print task.

3. To **save** the report, select the Save Rows As option. Save the report as a Powersoft Report (.psr). This file type must be used if original formatting is desired. **NOTE: Use the "drag and drop" method to open a saved .psr report.** To do this, open both Netscape and Windows Explorer. Position the open windows so that both can be seen on the screen. Navigate to

and click on the saved file in Windows Explorer, then holding the mouse button, drag the file from Windows Explorer to the Netscape window. When the file is positioned over the open Netscape window, release the mouse button.

4. To **export** the report to Excel, select the Save Rows As option. Save the report as an Excel or Excel With Headers file (.xls).

1. The My Inbox folder is the default folder and cannot be deleted. However, you may change the name of this folder, as well as, create additional folders by selecting the Maint (Maintenance) button from the CASPER menu bar. The CASPER Maintenance page will display.

2. To create new folders, select the Insert button. Enter the name for the new folder in the blank field under My Inbox (Figure 2-16).
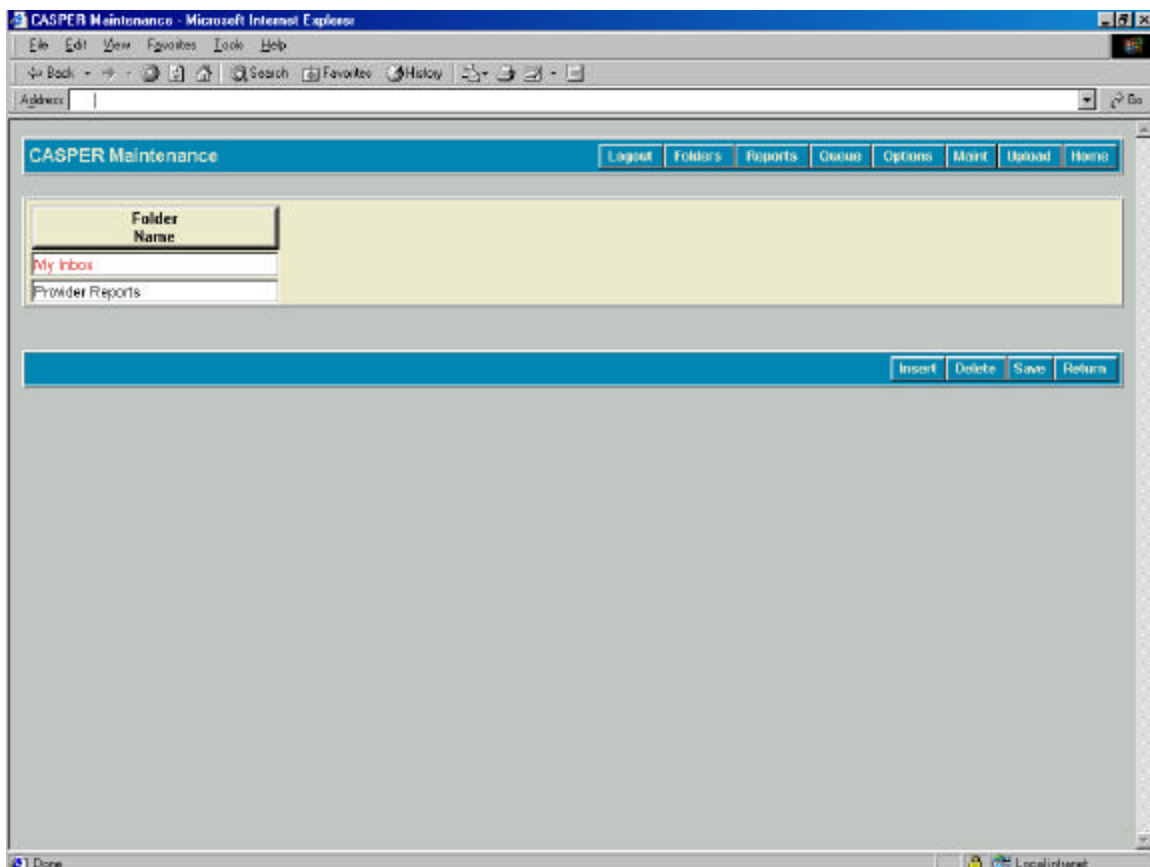

Figure 2-16. CASPER Maintenance page

3. To save this new folder, select the Save button. To continue, select the Insert button again to create another folder, or the Return button to return to the CASPER Folders page.

4. To move reports from the default folder to your newly created folder, place a check in the box to the far right of the report listing and select the Move button (Figure 2-17).
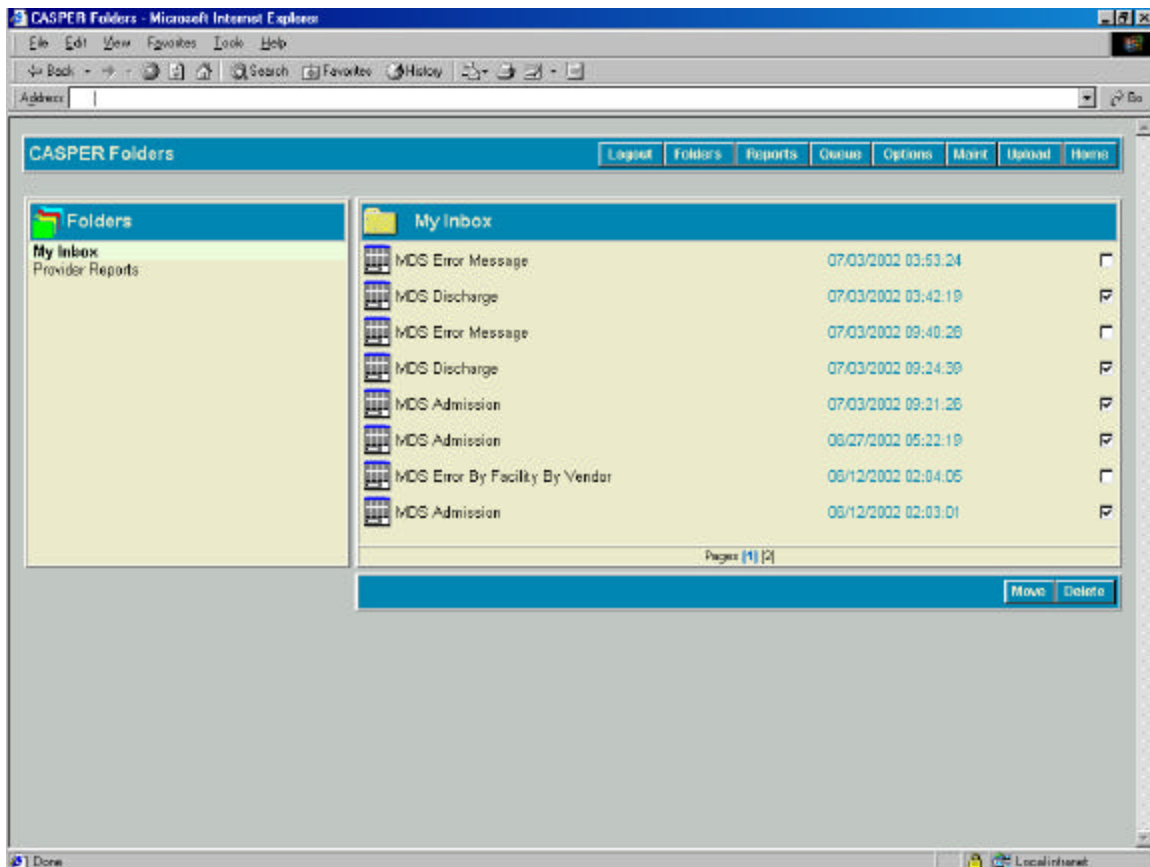

Figure 2-17. Moving Reports

5. The CASPER Move page will display with a list of the reports that were selected (Figure 2-18).

6. Open the drop down box and highlight the folder that the reports should be moved to. First select the Save button to retain the change, and then the Return button to return to the CASPER Folders page.
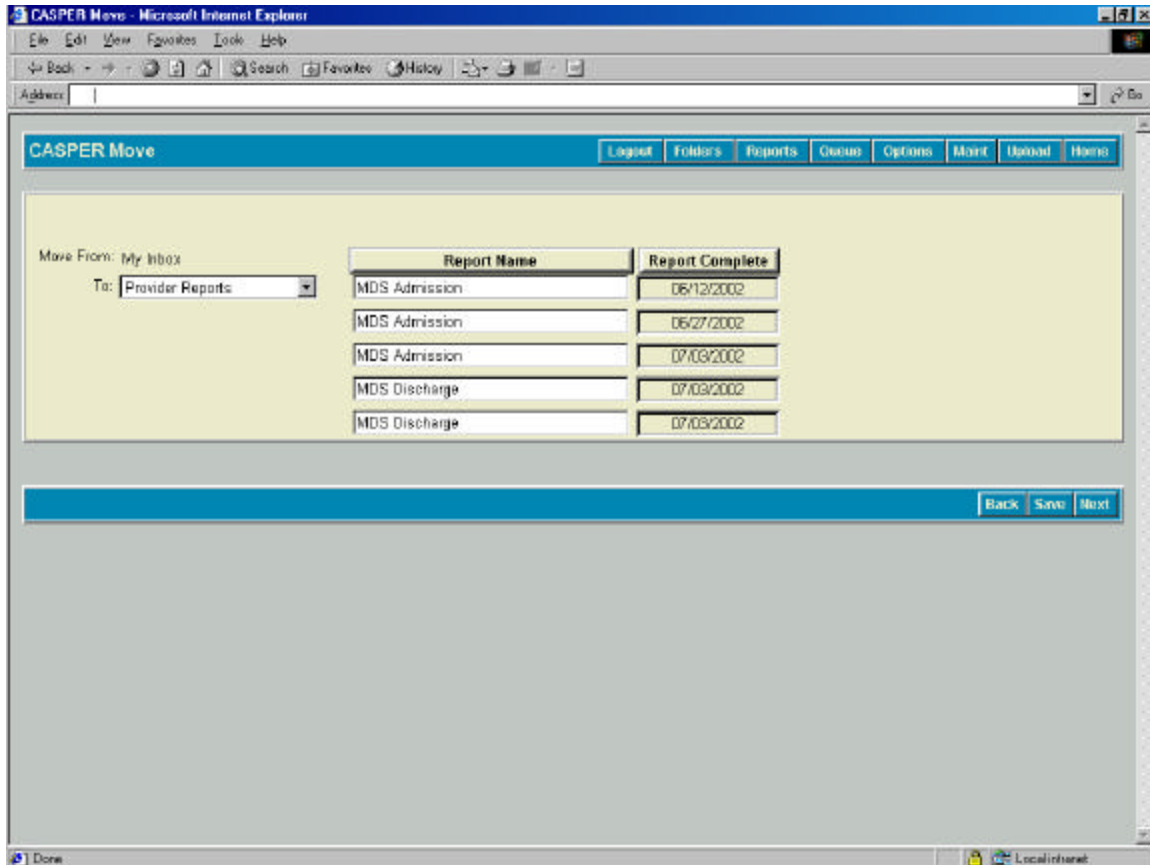

Figure 2-18. CASPER Move page

7. When returning to the CASPER Folders page, you'll notice that the new folder now contains the reports that were just moved (Figure 2-19).
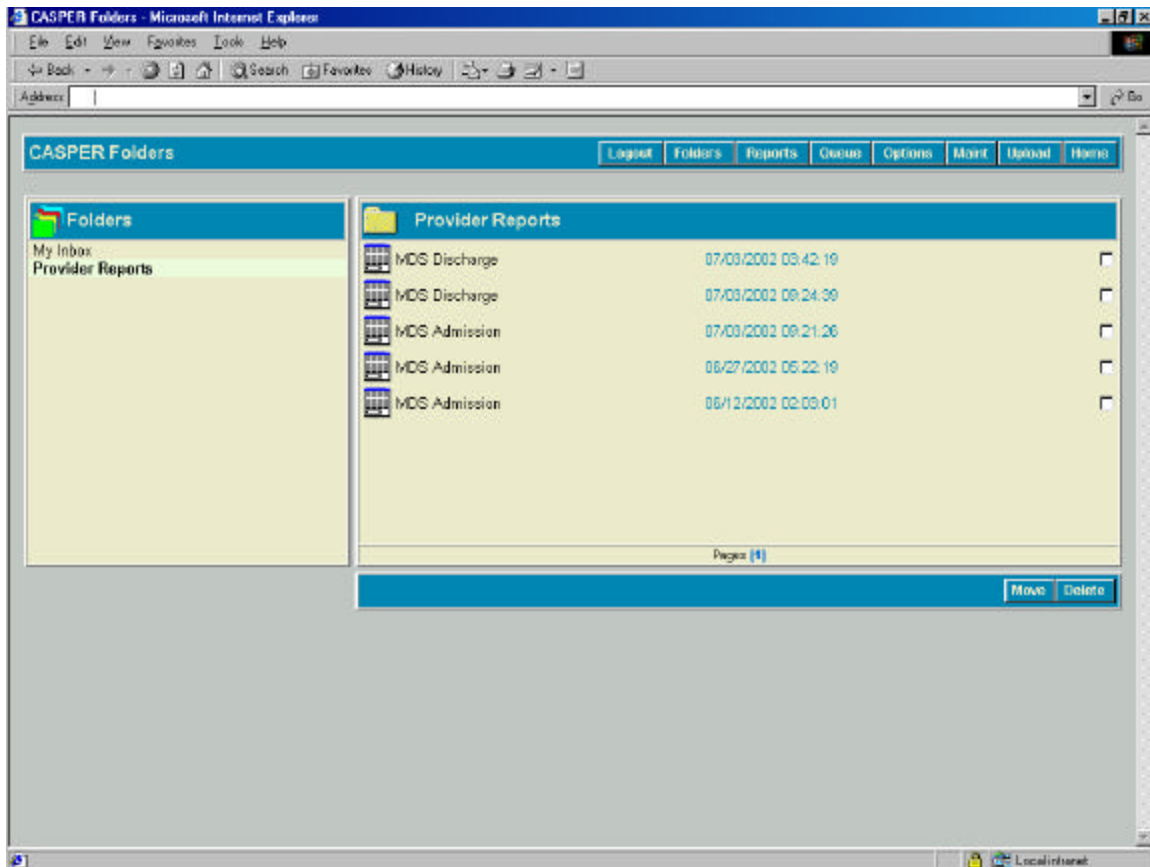

Figure 2-19. Newly Created Folder

8. To delete reports, place a check in the box to the far right of the report listing and select the Delete button.

9. A message will display requesting that the user confirm the delete request (Figure 2-20).
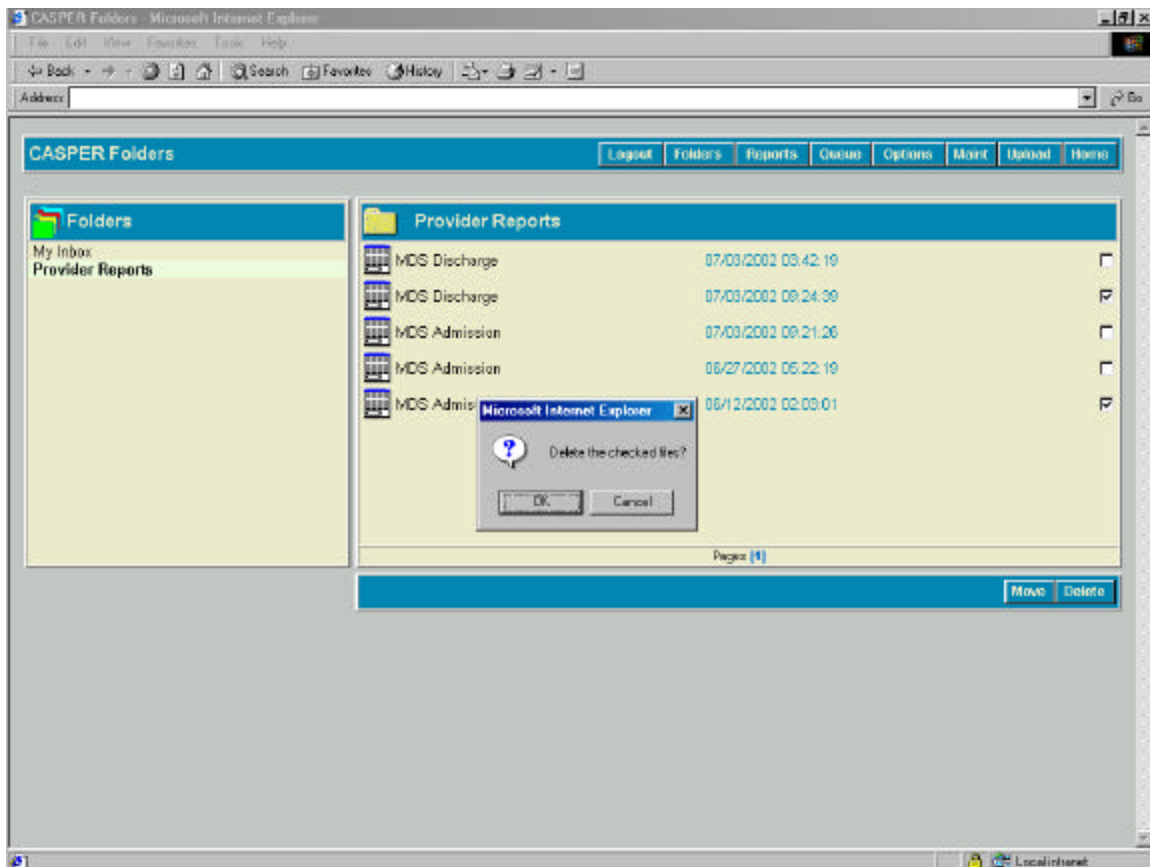

Figure 2-20. Delete Confirmation

10. To continue with the deletion request, select the OK button. The CASPER Delete page will display. (Figure 2-21).
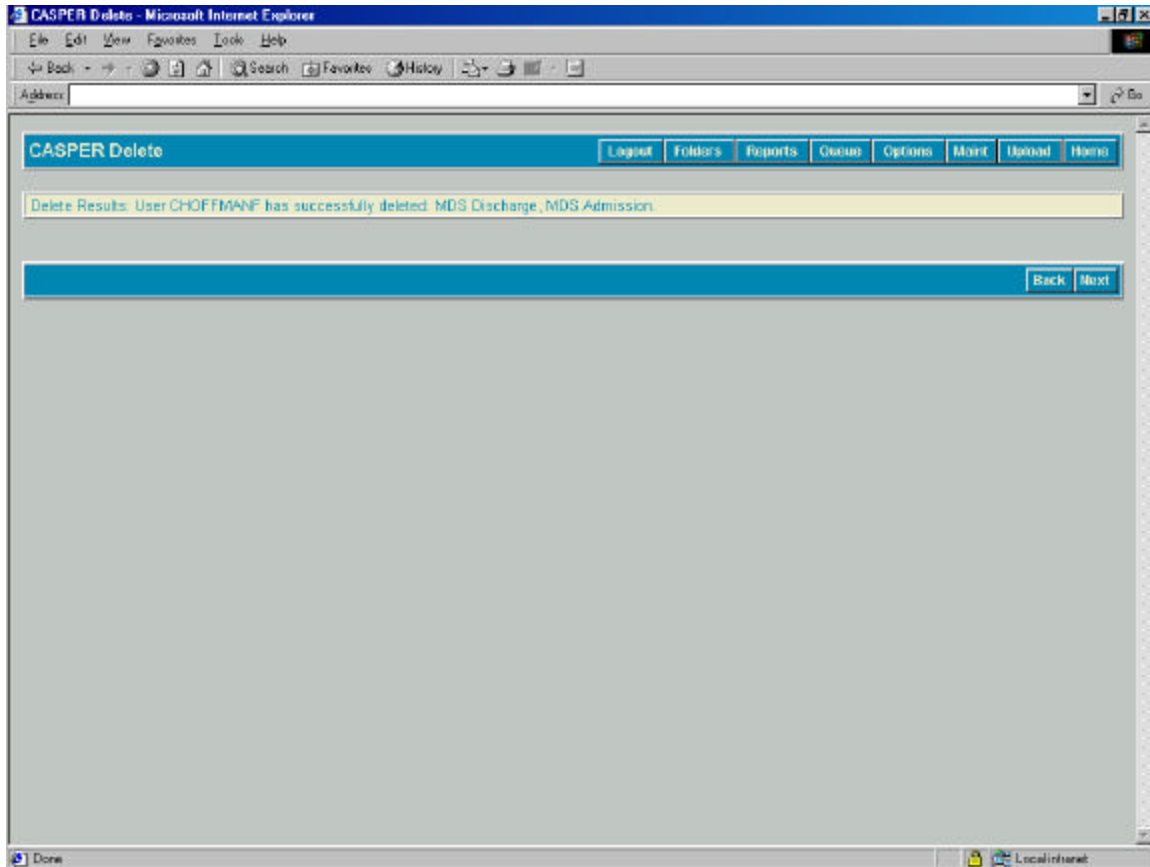

Figure 2-21. CASPER Delete page

11. To return to the CASPER Folders page, select the Next button.

12. As depicted in Figure 2-17, when numerous reports have been requested and delivered to the default folder, additional "pages" will be created and the reports will be accessible via page numbers towards the bottom of the frame. To alter the number of reports that are displayed on any given page in the Folders section, select the Options button from the CASPER menu bar.

13. The CASPER Options page will display allowing the user to enter the desired number of rows in the Setting Value field. After the entry has been made, select the Save button to retain the setting, and then the Return button to return to the CASPER Folders page (Figure 2-22).
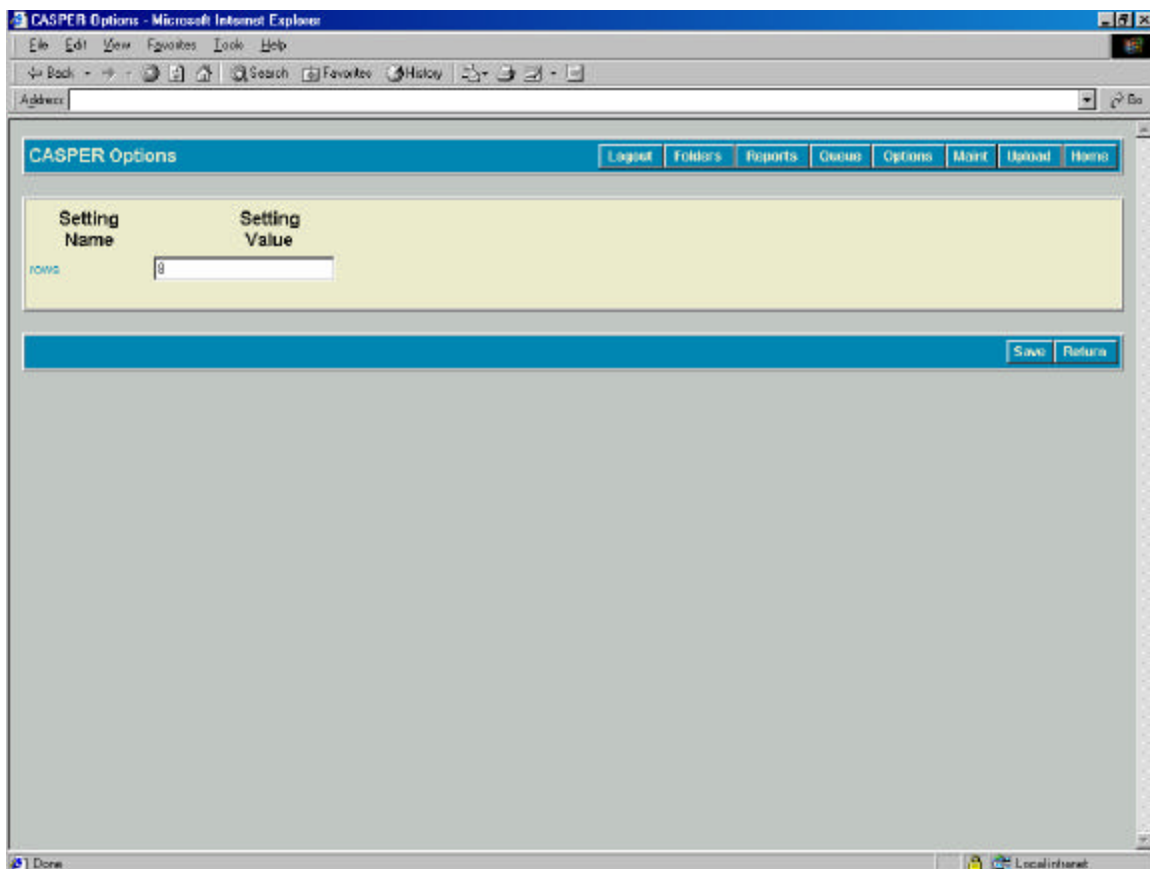

Figure 2-22. CASPER Options page

Powersoft Report Viewer (IE Only):

1. Due to the inability of saving PowerSoft (PSR) report formats in CASPER Reporting while using Internet Explorer versions 5.5 SP2 and higher, a PSR Viewer has been created.

2. To obtain the PSR Offline Viewer, which will allow loading, displaying, and printing of PSR files, follow the instructions posted on the bottom of the CASPER Home page. (Figure 2-23)

Click here to get the PSR Offline Viewer (IE Only)

1. After clicking on the link above, select "Open" from the "File Download" window that displays.
2. Select a directory and choose "Extract" to create a new folder ("WEB") containing the viewer files.
3. Close the ZIP program and navigate to the directory where the new "WEB"

where the "IE_PSR_Viewer.html" file is located, you may just enter the filename rather than the entire directory path (i.e. "OBQI_report.psr")

Figure 2-23. PSR Viewer Instructions

3. Additionally, a link has been created specifically for saving a report for use with this viewer. When viewing a report online, simply **right-click** on the SaveAsPSR link in the Print toolbar.

4. Select "Save Target As." and save as a PSR file. Follow the guidelines provided in the instructions on the previous page for the directory in which to save the file. (Figure 2-24)
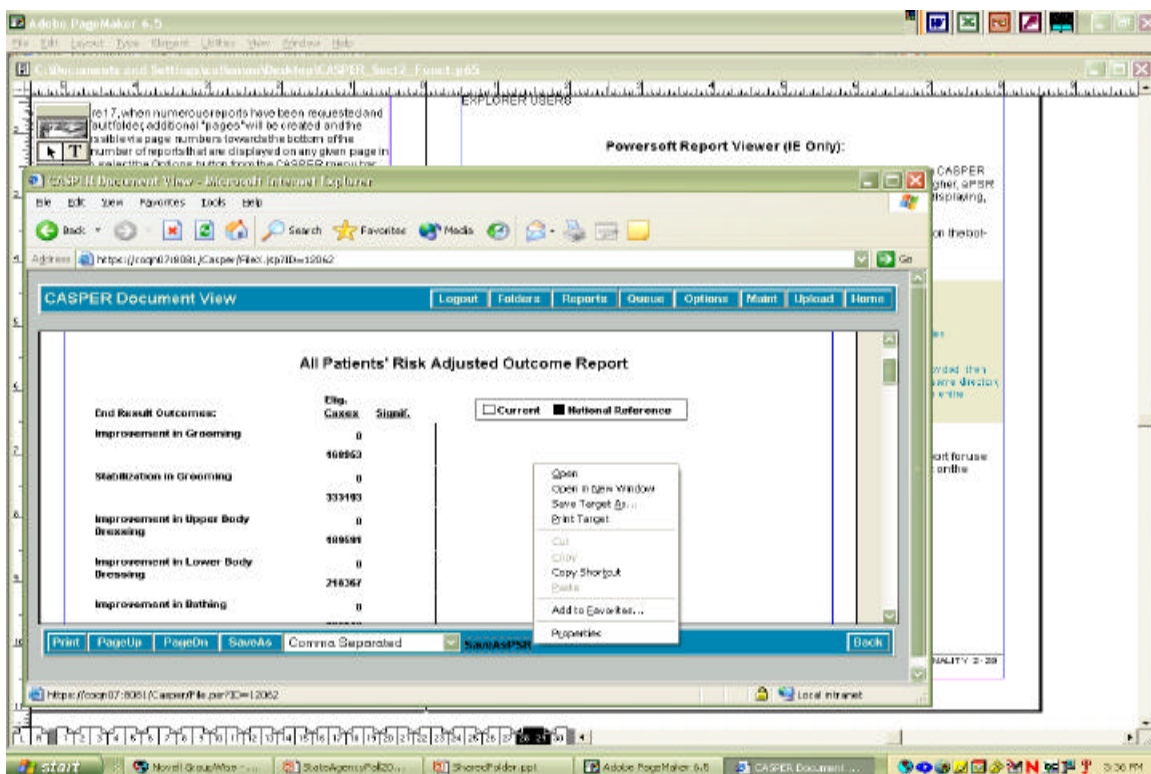

Figure 2-24. SaveAsPSR Link